



United States Department of Agriculture



**Financial Management
Modernization Initiative (FMMI)**

***FMMI Grantor Level 200 Training
Parking Lot Questions***

As of May 2013



Grantor Level 200 Training Parking Lot Questions and Responses
Grantor 200L Parking_Lot_5.2.13



ID	Course	Course Name	Question	Response
1	GM200	Agreement Screen & Workflow	Is it possible to search for a Grantee by the DUNS number?	Yes, Users can search for a Grantee using the DUNS Number. The DUNS Number is the equivalent of the ID Number when searching for a Grantee (i.e. Recipient). The DUNS Number is a part of the Vendor record replicated from FMMI, thus it will be automatically associated with any vender replicated to Grantor.
2	GM200	Agreement Screen & Workflow	There needs to be a visual display showing the WBS breakdown to Level 4. These levels need to be linked to ensure that user knows that they have chosen the correct title.	The WBS that shows in Grantor is the same as the one entered on the FPC in ECC. So if Users select a level 4 WBS, Grantor will show the same in its entirety.
3	GM200	Agreement Screen & Workflow	It is often hard to identify the correct Vendor in IAFTS, Will it be easier to search for the correct Vendor in Grantor?	<p>Grantor should help Users to easily find the appropriate Vendor because of the following:</p> <p>1) Vendors are replicated from FMMI (which were replicated from NRC and CCR) using a FAS flag, thus there should be no duplicates of any one CCR Vendor (i.e. Grantees)</p> <p>2) If a DUNS Number has been identified in the Grantor Vendor record, Users will be able to search for the Vendor using the DUNS Number</p> <p>Please note that there may still be multiple Vendors with the same name in the case that one university, for example, has multiple DUNS Numbers for various departments. Users must ensure that a DUNS Number is added to the Grantor Vendor record after a new Vendor is replicated into Grantor and that they select a Vendor by the DUNS Number, not just the name.</p>
4	GM200	Agreement Screen & Workflow	Will the Budget Office still maintain signed hard copies of Agreements?	Yes. The Budget Office will maintain the signed copy of the agreement.
5	GM200	Agreement Screen & Workflow	What is the process for rolling over funds in to the new fiscal year? Can transactions be performed in the month of October? Or when it is locked down during the end of the fiscal year? IAFTS allowed them enter the agreement, without having the funding listed.	Need to address this with the APHIS-FOST. Users can follow up with their supervisor and/or the FAS Grantor Help Desk support.
6	GM200	Agreement Screen & Workflow	What is the PVEND process?	The process the will remain the same. The PVEND form has been updated with a check box to flag Grantor vendors, APHIS - FOST will continue to perform this process.



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7	GM200	Agreement Screen & Workflow	How does a Program Manager specify that he/she wants to have a specific start and end date for an Agreement rather than the start date being the date on which the Agreement is signed. How does that tie into the award commencement expiration date provision?	The Proposed Period of Performance Start and End Dates will populate the header section of the award document. The Actual Period of Performance End Date will populate the 'Commencement/Expiration Date' section of the Award Document. As specified in the award document, the Period of Performance Start Date is the date that the Grantee signs the award document. The budget official will enter the Actual Start Date based on the signature date by the recipient.
8	GM200	Agreement Screen & Workflow	Will all Business Partner information from IAFTS be migrated to Grantor?	Vendors flagged as working with FAS will be replicated from FMMI to Grantor. These records will contain some, but not all information necessary for grants management. Additional information required for the Recipient, such as the Recipient Type, will also be maintained in the Grantor Business Partner record. Grantor specific Business Partner (BP) information must be manually added to the BP record. This information will not be taken directly from IAFTS due to the quality of data currently maintained in the IAFTS system. E14The goal of Vendor replication in Grantor is to reduce duplicates.
9	GM200	Agreement Screen & Workflow	Is the Cooperative Agreement reimbursable?	Reimbursable payments can be made on a Cooperative Agreement. All instrument types in Grantor allow for reimbursable payment. Grants, Cooperative, Joint Ventures allow for advance payments.
10	GM200	Agreement Screen & Workflow	What does the approval date refer to?	It is the date that the recipient signs the physical document. The Grantor Implementation Team is discussing additional functionality to be added to Grantor (e.g., digital signature process) in the future release.
11	GM200	Agreement Screen & Workflow	In the past, we haven't been able to put in vendor requests for CCR. You're saying we have to do a PVEND request. How are we supposed to check the box? When we do a PVEND request in FMMI, we have to certify the vendor is in CCR.	The applicant must register for CCR themselves. Once that is done, then the Program Staff should submit a PVEND request to have the vendor loaded to FMMI following the PVEND request process.

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12	GM200	Agreement Screen & Workflow	What's the difference between the joint venture and cooperative agreement?	A JV is authorized under 7USC 3318(b) which allows for projects of mutual interest where the parties both contribute resources for agricultural research and extension activities. A Cooperative Agreement is authorized under 7 USC 3391a which allows for international agricultural research and extension activities. A proposed project has to be permissible on the authority in relation to the project type.
13		Agreement Screen & Workflow	What is NICRA? How is it determined?	NICRA stands for Negotiated Indirect Cost Rate Agreement. A cognizant agency works with entities to determine their NICRA rate based upon the entities last 3 years of financial records. Typically a cognizant agency is determined by what agency the cooperator does the most business with. For FAS applicants, FAS has a interagency agreements with the Forest Service to provide NICRA rate.
14	GM200	Agreement Screen & Workflow	If the Program Manager (PM) receives an Agreement for approval from the Program Assistant (PA) (i.e. Agreement has status Draft Finalized), can the PM make changes directly to the Agreement or does the Agreement need to be returned to the PA to be edited?	The Agreement must be returned to the Program Assistant (PA) to be edited.
15	GM200	Agreement Screen & Workflow	Can the User change the Authorized Indirect Amount?	Yes. Users can change this amount. The Indirect Amount can be changed by a 5% margin when processing Claims.
16	GM201	Agreement Screen & Workflow	How does Grantor respond to a funds commitment change in FMMI?	Funds Commitments should not be changed directly in FMMI, as this will cause an uncorrectable error in Grantor.
17	GM200	Agreement Screen & Workflow	When is Phase 2 of Grantor set to be released?	Hopefully within 7-8 months. We will try to release functionality as it becomes available.
18	GM200	Agreement Screen & Workflow	Will the system show all objects billed against the total amount?	Yes, all financial transactions must be sorted by Cost Element. When creating a Claim, Users will be required to input costs against each Cost Element and available amounts will be decreased by line item.

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19	GM200	Agreement Screen & Workflow	How can Users ensure that an approval workflow does not get bottlenecked when an employee is out of the office and a Work Item is in his/her Worklist?	Users who plan to be out of the office for a period of time should alert their program staff in order that the program staff can take action to prevent the bottleneck. When a User is out of the office, program staff should alert the AGMO to forward the work item to another approver or approve the item in the User's stead. User's who are out of the office for a long period of time should have the agreement reassigned to another user.
20	GM200	Agreement Screen & Workflow	Why is it important to include the Key Personnel in the agreement?	Including Key Personnel in the Agreement is not required, but is recommended if there is one or more persons who the Grantee has agreed to have carry out the project and who is essential to making the award a success. If Key Personnel are included in the award and the Grantee is no longer able to promise that individual's time, the Program Staff can require the Grantee to replace a key person or make other changes to the Agreement to ensure that the project will be successful.
21	GM200	Agreement Screen & Workflow	How does the Payment Schedule field affect payments?	The selection of the Payment Schedule results in language of the award document, but has no affect on payments. If the Grantee initially agreed to file Claims once a month, but does not file a Claim for two months, that Grantee will still be paid as expected.
22	GM200	Agreement Screen & Workflow	Is it possible to attach documents to supplement the agreement?	Yes. The Program Manager and AGMO can add additional attachments to the Agreement in the Attachments assignment block at anytime. All other users can add Attachments at any point during the approval process. Only the AGMO is able to delete attachments.
23	GM200	Agreement Screen & Workflow	Its there a way to deviate from the approval process established in Grantor?	Within the Grantor system, there is no way to deviate from the established approval process. Users have the option to forward Work Items in order to have a different person approve, but they cannot add any or remove steps from the process. Users are welcome to seek guidance from appropriate personnel at anytime outside of the system.
24	GM200	Agreement Screen & Workflow	What does OGC mean?	OGC stands for the Office of the General Council.



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25	GM200	Agreement Screen & Workflow	Who is the official holder of the physical agreement documents, since Budget will no longer have this duty?	The program managers and program assistants who are responsible for the agreement will keep the physical records. However, longer term, since this information is stored in Grantor, this will be unnecessary.
26	GM200	Agreement Screen & Workflow	If FMMI is down, how will this affect Grantor?	<p>If the FMMI portal is down, Grantor will not be accessible. If the FMMI ECC system is down, Grantor may be accessible. While the FMMI ECC system is down, no financial transactions will be processed. This means that Funds Pre-Commitment data cannot be pulled into the Agreement screen, Funds Commitments cannot be generated or updated, and invoices cannot be processed.</p> <p>Users who know that FMMI ECC is down should do their best to refrain from processing transactions in Grantor. Grantor will provide an error message if transactions requiring communication with ECC cannot be processed.</p>
27	GM200	Agreement Screen & Workflow	When the AGMO forwards a Work Item, will that Work Item be removed from his/her Worklist?	Yes. When a User forwards a Work Item, the Work Item will be removed from all User's Worklists aside from the User to whom the Work Item was forwarded.
28	GM200	Agreement Screen & Workflow	Is the agreement bound by the Period of Performance chosen?	The Agreement is bound by the Period of Performance selected on the Agreement, unless an Amendment is made to change the Period of Performance dates. Claims can be processed after the Period of Performance dates if the expenses were incurred during the Period of Performance. Note that funds with end dates prior to the Period of Performance End Date cannot be spent once the funds expire.
29	GM200	Agreement Screen & Workflow	Is it possible to approve certain line items and reject others?	No. If any item needs review, the approver must return the agreement to the agreement owner to update and correct the agreement. There is a comment box for the approver to specify the necessary changes.
30	GM200	Agreement Screen & Workflow	How many funds pre-commitment numbers exist?	There is one funds pre-commitment number per agreement.
31	GM200	Agreement Screen & Workflow	Is the FRN going to increase with every year?	Same as an FRN. When you create a funds pre-commitment, it's the same as when you create a funds reservation.

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32	GM200	Agreement Screen & Workflow	Does the Budget staff review the Agreements?	Yes, the Budget staff will be the final reviewers to create the Funds Commitment (FC). Rather than the Budget staff though, Larry McClain-El and Mack Posely will be the primary reviewers of the financials for the agreements as the system validates the numbers but is unable to monitor other, non-numerical items.
33	GM200	Agreement Screen & Workflow	Does Grantor link to email?	Yes. Grantor will send emails to users (as appropriate).
34	GM200	Agreement Screen & Workflow	What constitutes a business day in the system?	Monday through Friday during normal business hours.
35	GM200	Agreement Screen & Workflow	Is there a provision in the system for a delegation of authority?	As of right now, there is no delegation. Users can handle this in one of the following ways: - Users can send them to the AGMO, who can forward them or approve them - The Program Manager (PM) can change the responsible employee while they are gone. - Users can use secure remote/VPN to approve the document from anywhere they may have internet access
36	GM200	Agreement Screen & Workflow	When would someone want to "Reserve" a work item?	Users would reserve a Work Item when it has been sent to multiple people in the workflow and Users want to ensure that they can review and approve it but, doesn't have time to review it fully. When Users reserve a Work Item, the Work Item is reserved from all other Users Worklist. This is standard system - Grantor functionality and may or may not be used by FAS.
37	GM200	Agreement Screen & Workflow	What if a PM receives an agreement in the workflow from a PA and they find one little mistake? Can the PM make the little change? Or do they need to send it back to the PA?	It has to be sent back to the Program Assistant (PA) for the correction to be made.



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38	GM200	Agreement Screen & Workflow	When the invoice comes to someone, it needs to be certified by the project manager. What is the process?	Invoices will be sent to the SF-270 inbox. The Invoice Processor will review invoices to ensure that they are legible, signed, and completed, input the Claim Overview data into Grantor and upload the SF-270. The Program Assistant receives a Work Item, completes the financial information, and approves the Claim. The Claim is then sent to the Program Manager to be verified, and an Invoice is created in FMMI upon the Program Manager's approval.
39	GM200	Agreement Screen & Workflow	If we are creating an Agreement and cannot find the vendor, can we save the Agreement?	In order to save an Agreement, the Recipient (i.e. Vendor) field is required. The Recipient field is one of the first fields on the Agreement screen, thus if a User is not able to find the correct Recipient, the User should not proceed in creating the Agreement. New vendors are replicated nightly from FMMI.
40	GM200	Agreement Screen & Workflow	Will Grantor have the capacity to deal with universities with several DUNS numbers?	Yes. Universities with multiple DUNS numbers will have a Vendor record per DUNS number in FMMI. The DUNS number will be attached to a Vendor in Grantor, and Vendors can be searched for using the DUNS number. Part of the application process is requesting the organization's DUNS number, so this should help to ensure that the correct Vendor has been selected.
41	GM200	Agreement Screen & Workflow	In IAFTS we have to enter the CFDA number. Will we need to enter the CFDA number in Grantor?	When a User selects a Program in Grantor, the CFDA number will automatically populate the appropriate fields on the Agreement screen.
42	GM200	Agreement Screen & Workflow	Where does the Master Agreement Number come from?	We have not yet established the process for the Master Agreement Number. When we have them, we will make them available on the Grants and Agreements SharePoint page.
43	GM200	Agreement Screen & Workflow	What's the difference between equipment and supplies?	<ul style="list-style-type: none">o Equipment: Equipment must have a useful life of a year or more and cost \$5000 or more. Property reporting is required for Grantees who have Agreements, and property typically has to be sold or disposed of in some way at the end of a project.o Supplies: Supplies are anything costing less than \$5000 and/or having a useful life of less than a year. Most computers, for example, are supplies. The Grantee can keep supplies.



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44	GM200	Agreement Screen & Workflow	At what time in the Award process can we communicate the pre-award allowance?	<p>A Grantee can always spend money prior to the Agreement, but Program Staff should never encourage or verbally give permission for their Grantees to do so. If a Grantee spends money prior to the award document being signed and the award is not approved, FAS cannot reimburse the Grantee for those pre-award expenses.</p> <p>The official communication about the pre-award allowance will be a part of the award document.</p>
45	GM200	Agreement Screen & Workflow	If you select to allow pre-award, what percentage of the total grant can be reimbursed for expenses incurred prior to the award start date?	If pre-award is allowed, there is no limit on the expenses incurred prior to the Grant being awarded that can be reimbursed. The amount must be reasonable based on the reasonable person standard, allowable, necessary, and allocable.
46	GM200	Agreement Screen & Workflow	Does Grantor allow for money to be moved between line items and cost elements?	Yes, Grantor does allow for money to be moved between line items, but once an Agreement is executed, any line item changes will need to happen through an Amendment. If an adjustment is less than 10% of the value of the Agreement or the Agreement is less than \$100K, the Amendment will go straight to executed upon submitting the Amendment. More significant changes will require an Amendment to be sent through the approval process and the Grantee to sign an Amendment document.
47	GM200	Agreement Screen & Workflow	What is a funds pre-commitment?	The Funds Pre-Commitment is very similar to the FRN. When you create a funds pre-commitment, it's the same as when you create a funds reservation.
48	GM200	Agreement Screen & Workflow	Do we have to add the performance reports on a quarterly basis?	No. Users can select for Grantees to be required to submit Performance and Financial reports quarterly, semi-annually or annually. Upon receiving these reports, Users should attach the reports to the Agreement.
49	GM200	Agreement Screen & Workflow	Is the idea to phase out IAFTS?	For the immediate future, Program Staff should continue to use IAFTS as a project management tool. IAFTS will also continue to be used for individuals and foreign entities, until that functionality becomes available in Grantor.



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50	GM200	Agreement Screen & Workflow	When you check boxes in the Project Overview assignment block, such as "Outside the US" or "Subcontracts/Sub awards", what is the impact in the system.	Check boxes in the Project Overview assignment block will result in additional provisional language in the award document as well as some additional information that may be required in the Agreement.
51	GM200	Agreement Screen & Workflow	Which Agreements will be migrated to Grantor and which Agreements will we continue to manage in IAFTS?	All new agreements with domestic partners will be put into Grantor. FY13 agreements with no financial transactions will be migrated just before Grantor goes live. After Grantor goes live, we will put together a team to assess which agreement should be converted into the system.
52	GM200	Agreement Screen & Workflow	What is the structure to ensure that things do not get lost and program staff is not chasing down people all of the time?	The Grantor solution /process will involve fewer people. In this process, we will know exactly who is responsible and who has worked with the agreement, as well as the true status of the agreement. If information is entered correctly the first time, there won't be data quality issues later on.
53	GM200	Agreement Screen & Workflow	When creating an Agreement, can you setup Grantor to default to the appropriate approvers?	No, Users must select the appropriate approvers each time that they create an Agreement. If they select no approver at a given approval level, the Agreement will be sent to all approvers assigned to the Agreement's Program.
54	GM200	Agreement Screen & Workflow	Will the Program Manager receive an email to inform them that Agreements have been approved?	Users will not receive an email notification to alert them that an Agreement has been approved. If the Program Manager does not receive an email notification alerting them that a Work Item has been sitting in a user's inbox for two days, the Program Manager can assume that the Agreement is not "stuck" in the approval process.
55	GM200	Agreement Screen & Workflow	What is the Funds Commitment Number that is displayed in Grantor?	The Funds Commitment number displayed in Grantor corresponds to the number in FMMI. A User can search for the Funds Commitment in FMMI using that number.
56	GM200	Agreement Screen & Workflow	Will we still need to create Funds Commitments in FMMI?	The Funds Commitment will be automatically generated in FMMI. The Funds Commitment will no longer need to be manually created.



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57	GM200	Agreement Screen & Workflow	If a minor edit is needed to a Word Document attached to the Agreement, how can you make this edit?	Every user can attach documents to the Agreement during the workflow, thus if edits need to be made, Users should download the document from Grantor, make the necessary changes and attach the new version. Users, aside from the AGMO, cannot delete attachments, thus the old version must remain attached to the Agreement.
58	GM200	Agreement Screen & Workflow	If we get stuck, is there a help desk?	<p>Yes, send an email to grantorhelpdesk@fas.usda.gov. He'll be the primary point of contact for this. If there are system defects you find later on, he will be the person to contact. He will answer the questions he can and elevate other more technical questions to the appropriate parties.</p> <p>The AGMO and GMO are also a good resource for resolution to questions.</p>
59	GM200	Agreement Screen & Workflow	Do we have the ability to switch the answers to the Agreement Decision Questionnaire after we answer them?	Yes, changing answers to previous questions will change the following selection available. In addition, the system will provide you the opportunity to select "Yes" or "No" to the instrument type. If you select "No", the system will direct you to speak to the AGMO and allow you to re-do the questions.
60	GM200	Agreement Screen & Workflow	Is monitoring and evaluation considered "Substantial Involvement"?	It can be if we are setting requirements for the recipient that are above what is standard for the program area. Requiring Performance and Financial reports is not Substantial Involvement.
61	GM200	Agreement Screen & Workflow	How will the actual start date be updated if the User enters the dates prior to receiving the award document back from the recipient?	The Budget Official is responsible for updating the Actual Start Date, which will be the date that the Grantee signed the Award Document, upon receiving the Agreement Work Item to be approved.
62	GM200	Agreement Screen & Workflow	If FMMI goes down, can I access Grantor?	It depends. If the FMMI Portal goes down, then you will not be able to access Grantor. If only the financial management module in FMMI (i.e. the ECC system) goes down, then you will be able to access Grantor, but will not be able to process financial transactions that require Grantor to communicate with FMMI.
63	GM200	Agreement Screen & Workflow	What if I have a foreign vendor who doesn't have a DUNS number?	Grantor release 1 does not cover foreign entities, so you will handle them the same way that you have in the past. This is being considered to be in scope for release 2.



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64	GM200	Agreement Screen & Workflow	Can invoicing be done monthly if the recipient's financial reporting is set to quarterly?	Yes. The recipient may invoice as frequently as needed, despite the recipient's financial reporting requirements.
65	GM200	Agreement Screen & Workflow	If a recipient on an already executed agreement is determined to be "high risk", does it require an amendment to the agreement?	Yes, an amendment will need to be created in Grantor to identify the Grantee as "high risk."
66	GM201	Amendment Screen & Workflow	Will Grantees continue to have the right to reallocate 10% of the Agreement amount to different Cost Elements?	For Grants and CAs if the agreement is over equal to or greater \$100,000 and the transfer of funds for budget items is 10% or more then a modification is required; otherwise they may reallocate as needed. For JV and CRs the same a if the agreement is under \$100K and the budget line is \$10,000 or more and the transfer is 10% or more then written approval is required otherwise then they may reallocate as needed.
67	GM201	Amendment Screen & Workflow	What happens if the NICRA Rate changes?	Currently, the NICRA rate remains the same throughout the life cycle of an agreement. E75In the future, if the NICRA rate changes, users will be able to manually change the Indirect Expenses for each budget line item.
68	GM201	Amendment Screen & Workflow	Can you use multiple Funds Reservations on one Pre-Commitment?	Yes, FMMI allows Users to use multiple Funds Reservations on one Funds Pre-Commitment.
69	GM201	Amendment Screen & Workflow	Do we have to decrease the amount of the funds pre-commitment if the level of funding changes?	Yes, the money will need to be de-obligated from the Funds Pre-Commitment in order for those funds to be available for another Agreement.
70	GM201	Amendment Screen & Workflow	Will the Program Managers and Program Assistants be able to edit the Funds Pre-Commitment?	Yes. Users with the FMMI Funds Pre-Commitment Processor role, should be able to edit Pre-Commitment. Currently, Program Managers and many Program Assistants will be able to edit the Funds Pre-Commitment. If Users need additional roles, they will need to work with their supervisor to follow the role request process.



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71	GM201	Amendment Screen & Workflow	Are any changes to an Agreement that occur in Grantor called Amendments?	A limited number of fields can be changed directly on the Agreement. These changes will not be called an Amendment. All changes required beyond these will be considered an Amendment in Grantor. Users can refer to these as Change Requests. An Amendment made in Grantor only requires notification and approval of the Grantee in certain scenarios, which will the system will determine. Please note that change requests fall under scenarios and different scenarios result in different approval workflow processes, with some approvals workflow resulting in the signing of a modification document.
72	GM201	Amendment Screen & Workflow	How can a User see what the original Agreement looked like?	The Agreement in Grantor is always the most up to date version of the document. Users can refer to the Agreement history to see any changes made to the Agreement. Users can also view the Old Values on the Amendments which represent the value that was on the Agreement before that Amendment was approved.
73	GM201	Amendment Screen & Workflow	How will these change requests be reflected in IAFTS?	It will depend on how the programs want to use IAFTS. Once all recipient types are brought into Grantor, it's probable that this functionality will be turned off in IAFTS.
74	GM201	Amendment Screen & Workflow	Will users need to enter both the funds reservation and pre-commitment, thus entering the same information twice?	No, OCBD will only be required to make a Funds Pre-Commitment. Funds management is in the process of being schedule to provide details.
75	GM201	Amendment Screen & Workflow	Often in the current agreements, when we add an amendment, there may be money in an old amendment, and we're supplementing it with a new WBS. Can a user add a new WBS to an Agreement?	Under an agreement and a amendment any costs are associated with the original agreement scope. Users can always add an additional WBS to the Funds Pre-Commitment. This user will then have to add a new line item in the Amendment that a user creates.
76	GM201	Amendment Screen & Workflow	Are all Users able to edit other User's draft Amendments?	Users that are in the Program assigned to the Amendment will be able to edit the Draft Amendment.
77	GM201	Amendment Screen & Workflow	Does the Amendment have the same approval workflow as the Agreement?	It depends on what is changed in the Amendment. If the Agreement amount is being increased or decreased, the Amendment will go through the same approval process as the Agreement. Other changes will result in different workflows. See the Amendment Approval by Role Job Aid for more information.

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78	GM201	Amendment Screen & Workflow	Say you have an agreement with Missouri, and they want to add resources, which doesn't affect US funding. Is that a cost share?	Users can make a change to the budget party contribution table.
79	GM201	Amendment Screen & Workflow	How many amendments can you make in Grantor?	This is determined by Program, not Grantor. Grantor will allow Users to make as many Amendments as they desire to one Agreement.
80	GM201	Amendment Screen & Workflow	Can the branch chief change? Will we have to amend the agreement every time there is a change in staffing?	Changes in Partners identified on the Agreement can be made directly on the Agreement screen. An amendment is not required to change the Branch Chief. Note: The agreement can not be in the approval process when deciding to change the Branch Chief.
81	GM201	Amendment Screen & Workflow	If someone's name changes, will it automatically update?	Yes, if the contacts name is updated in Grantor.
82	GM201	Amendment Screen & Workflow	Can you save with an error message and come back and fix later?	Users can save with warning messages, but Users cannot save or submit his/her work if an error message is showing.
83	GM201	Amendment Screen & Workflow	When you enter the program amount, does it figure out the indirect amount for you?	Yes. The indirect cost is calculated according to the NICRA rate and included for each individual line item.
84	GM201	Amendment Screen & Workflow	Can you input the indirect amount and have the system calculate the direct amount?	At the present time for Release 1, the system does not have the capability to do this.
85	GM201	Amendment Screen & Workflow	What qualifies something to be a public notice?	Anytime a recipient uses a media outlet from them to an external population such as newspaper, magazines, TV, blogs, news segments, or social media.
86	GM201	Amendment Screen & Workflow	Does the wording in the Award Document change according to the instrument type?	Yes. The system will choose the appropriate language based on the instrument type and by program staff responses to the Grantor data elements.
87	GM201	Amendment Screen & Workflow	If you've submitted an Amendment, can you edit it easily?	Yes, edits can be submitted. If Users need to edit a submitted Amendment, Users should find the Approver who has it and have them send it back to the User.
88	GM201	Amendment Screen & Workflow	Can an amendment be deleted?	No. Amendments cannot be deleted, but can be cancelled. If Users cancel an Amendment it remains in the system but cannot be edited.
89	GM201	Amendment Screen & Workflow	Are there certain users that can cancel an Amendment?	Only the Program Manager and AGMO can cancel an Amendment. An Amendment is cancelled through a Work Item when the document is returned to the Program Manager.



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90	GM201	Amendment Screen & Workflow	Can you process invoices when an amendment is in process?	Not currently, however, future enhancements will allow the processing of an invoice when an amendment is in process; however, it will not allow an amendment to process if a invoice is in process
91	GM201	Amendment Screen & Workflow	Are the Agreement and Amendment Numbers in the subject lines of a Work Item related?	No, the Agreement and Amendment numbers generated by Grantor are not related. The FAS Agreement and FAS Amendment numbers are related, with the FAS Amendment number being the FAS Agreement number with two additional digits representing the number of Amendment associated with that Agreement.
92	GM201	Amendment Screen & Workflow	Can you see the entire history of the agreement/amendments?	Both the Agreement and Amendment screens will have a section entitled Transaction History and Change History that show all transactions processed against that document and any changes made to the document.
93	GM201	Amendment Screen & Workflow	Should Program Managers choose a Branch Chief? If they don't designate one, does it go to everyone?	Typically, Program Managers should select a Branch Chief to limit the number of users receiving Work Items in the Workflow. If they don't designate one, the notices will go to every Branch Chief associated with that CFDA program.
94	GM201	Amendment Screen & Workflow	If we have two budget officials, do we list both of them?	Yes. Once one of them approves, the Work Item will disappear from the other Budget Officials Worklist.
95	GM201	Amendment Screen & Workflow	I usually spell out what I want in a quarterly report. Where can I detail the criteria I'd like to see reported?	Users can spell out these requirements in the Cooperator Specific Performance Requirements or Project Description free text fields in the Project Narratives section.
96	GM201	Amendment Screen & Workflow	Is my branch chief able to cancel the agreement I've created?	No, the Branch Chief can return it to User that created the Agreement for User to cancel it.
97	GM201	Amendment Screen & Workflow	Why do the budget officials have such a limited role? It seems that the PAs and PMs are doing so much more now.	Through the use of Grantor system many of the budget officials responsibilities have been consumed. Budget is no longer involved in making decisions in how to spend funding under an agreement.
98	GM201	Amendment Screen & Workflow	Who will be training the staff to complete all these new reporting requirements?	Program Staff is not responsible for completing the new reporting forms, these are the responsibility of the recipient. Universities should be familiar with these forms such as the SF-425, SF-PPR.
99	GM201	Amendment Screen & Workflow	Does the Paper Reduction Act only apply to US residents and entities? If so, then information collection does not apply for foreign entities?	Grantor release 1 only applies to domestic entities therefore, the Paper Reduction does apply. We are awaiting OGC guidance on how to handle foreign entities.

ID	Course	Course Name	Question	Response
100	GM201	Amendment Screen & Workflow	Can we designate a recipient as “high risk” right away without the recipient thinking the Agency is being overly harsh?	Yes, we can do that because the regulations allow us. The high risk designation is for us to help the recipient carry out the task. We want our recipients to be successful so that they are able to provide the public purpose that the agreement is supposed to provide.
101	GM201	Amendment Screen & Workflow	When we receive a budget from the recipient, do we have to enter the budget into Grantor line item by line item or by cost category?	Users can by cost category. Users enter the total only per category.
102	GM201	Amendment Screen & Workflow	Right now, we have budget codes for certain countries. How will the data be affected?	The countries are identified in the cost center.
103	GM201	Amendment Screen & Workflow	How does the system work with a one-time extension?	Currently, the system has no restrictions built around a one-time extension. The Program Manager will need to keep track of whether the Grantee requested a one-time extension in order to ensure that they do not allow the Grantee another cost extension.
104	GM201	Amendment Screen & Workflow	Can a division director be a backup approver for a branch chief?	They can be, but only in special circumstances: 1. The Division Director has specific permission and a user role in Grantor. Can request a different role, but this will mean that you would get all the emails. 2. When the Branch Chief forwards it to Users, Users are acting in their stead, and then it would come to you again and you would essentially approve twice. Users could also go to the AGMO, who could approve it.
105	GM201	Amendment Screen & Workflow	Can the program manager email the Division Director if the Branch Chief is gone to get approval?	No. If it's in a branch chief's inbox, the division director can't go in the system and find it because it exists in the system in the inbox. The Program Manager should reach out to the Division Director.
106	GM201	Amendment Screen & Workflow	Could the program manager select a different branch chief if they know this one will be gone?	Yes. Branch Chief can make this change directly on the Amendment.
107	GM202	Claims Screen & Workflow	There is a separate line item for accounting elements. Is it true that they don't interact?	In Grantor, there won't be 2 BOCs. FMMI is a financial management tool. Grantor is a grants management tool within FMMI. For grant management, Users break it down by cost elements. Users need to break down the cost elements for program management but not for FMMI. This breakdown by cost element.

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108	GM202	Claims Screen & Workflow	ULOs - [need to expand on question]	All line items are in the same assignment block. It doesn't matter what amendment the activity took place in. It's added to the funds commitment once added. All the money goes back to one agreement and goes against the one cost item. You can create a new line, but you can use "first money in, first money out." All the system knows is when the money is available, and when it expires.
109	GM202	Claims Screen & Workflow	I can see an invalid claim, but I don't know why it was rejected. Is there a place for the processor to note that?	Yes, there is a notes section, but it's not required. We have submitted a change request to make it required.
110	GM202	Claims Screen & Workflow	How are we addressing the issue of slow turnaround on invoices sent to the GIP?	This issue has been addressed. They do process but not at the volume they're supposed to. There is a concerted effort to ensure that there won't be a bottleneck.
111	GM202	Claims Screen & Workflow	Will the entire Grantor process be paperless or will we still have paper involved?	In Phase 1, a paper Award Document will still need to be sent and signed, but the entire Claims process will be paperless. Once the Grantee can input their own information and approve documents into Grantor, the entire process will be paperless.
112	GM202	Claims Screen & Workflow	What should I do as a Program Assistant if my Program Manager is gone and I need to process a Claim?	If someone leaves for an extended period of time, they need to go back in and reassign their workflow in Grantor (they'd go change the employee responsible. AGMO can do this, too). If it's a shorter period of time (i.e., TDY), the AGMO could approve, or they would need to wait till this person returned.
113	GM202	Claims Screen & Workflow	Why is this not editable? If someone creates an agreement and doesn't click pre-award but changes their mind, what happens?	If they get a claim, they need to reject the claim and then modify the agreement to include a pre-award date before processing the claim.
114	GM202	Claims Screen & Workflow	Where do we find the NICRA Rate information?	The universities should be able to provide you with paper work that includes their NICRA Rate.
115	GM202	Claims Screen & Workflow	What happens after the Grantee sends an updated version of an invalid Claim?	The invalid claim will remain in the system as null and void. If a new one is submitted, it will be a new document in Grantor.



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116	GM202	Claims Screen & Workflow	What is the different between Invalid, Not Eligible, and Cancelled?	Invalid: The grants invoice processor reviews the Claim and discovers a problem. A Claim saved with status Invalid cannot be edited again. Invalid is a final status. Not Eligible: Not eligible is not a final status. It means that the grantee is ineligible because of a system issue. This problem can be fixed and then changed and run through the system. Cancel: The PM cancels a claim after they discover a problem with the invoice (i.e., unallowable costs). Cancel is a final status meaning a cancelled Claim cannot be edited.
117	GM202	Claims Screen & Workflow	If I have a physical copy of a form, can I attach?	Yes, you can attach something at any point to the agreement. When you attach it, you can select a title for the document.
118	GM202	Claims Screen & Workflow	Can you search for an invoice?	The Invoice number in FMMI can be found on the Claim. The Invoice can only be viewed in FMMI.
119	GM202	Claims Screen & Workflow	Does the Worklist associate Claims with the Agreement?	The subject line of a Claim Work Item will show the Claim number, not the Agreement number. Once you click on the Work Item, it will give you the FAS agreement number. When you go to the claims screen, it shows you the Grantee in the header section.
120	GM202	Claims Screen & Workflow	Will the invoice show up in our Worklist?	No, when Users approve a claim as a PM, the invoice is immediately created.
121	GM202	Claims Screen & Workflow	Who is the Grant Invoice Processor for OCBD?	At the present time, the Grantor Invoice Processor for OCBD is Tenille Lee Royal.
122	GM202	Claims Screen & Workflow	What happens with wire transfers?	Wire transfers won't happen as a part of the Grantor process. Foreign entities are not in scope for release 1. This will be addressed for release 2.
123	GM202	Claims Screen & Workflow	How many people will be putting invoices into Grantor?	It should take less than one FTE (Tenille Lee-Royal) to carry out this function. Currently, there is one backup (Lidia Abebe) and 3 AGMOs (Chris Coppenbarger, Mack Posely, Aaron Alonge) who can help with this.



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124	GM202	Claims Screen & Workflow	For most of my agreements now, I've had to go to a university to have them do travel and it wasn't a line item in my budget. What do I do when a cost element isn't originally listed?	If it's an agreement with \$100k or more and a period of performance of 1 year or more, and there is a request for a new line item that is 10% or more of value, then it needs to be rejected and an amendment needs to be added because the agreement is being changed significantly. Otherwise, you do a net zero change to the agreement. You'd move money from one or more budget line items into "travel" and click submit and you'd be able to associate the charge for the travel directly to the claims screen at that point.
125	GM202	Claims Screen & Workflow	Regarding the Invoice Mailbox, what is the frequency of people accessing the inbox to work with invoices?	They are supposed to monitor it on a daily basis. Go to the Grantor help desk if you have any concerns about claims being entered into Grantor so that we can track the process and problem.
126	GM202	Claims Screen & Workflow	There are three parameters to mark a claim invalid. What if there aren't enough funds to pay?	The Program Manager (PM) will validate that the Agreement has enough funds to pay for the Claim. If there are not enough available funds, the PM will cancel the Claim.
127	GM202	Claims Screen & Workflow	What if the Grantee doesn't submit quarterly reports until the end of the agreement?	If the Grantee does not submit quarterly reports until the end of the agreement, then Grantee not compliant with the terms of the agreement. If Grantee does not submit anything until the end, they would not get any reimbursement until it's done. But if they are not reporting, talk to AGMOs (as appropriate) to get Grantee on track rather than waiting until the agreement closes out.
128	GM202	Claims Screen & Workflow	How should we handle reporting if the Grantee is not active for a while, for example there are 6 months between two conferences?	The project recommends Users to be as strategic as they can when setting report deadlines. Quarterly reports won't necessarily make sense. Users could put additional requirements in the scope of work.
129	GM202	Claims Screen & Workflow	Is there a way to change the due date of the Progress Reports?	No. If Users wanted to change the Due Date, that should be done through a change to the reporting schedules required in the Agreement.
130	GM202	Claims Screen & Workflow	How will the NICRA be determined on the Claims Screen?	The NICRA rate will be the rate identified on the Agreement screen. Indirect costs will be automatically calculated, but Users will be able to edit this rate by a 5% margin.